FALL 2014 SNAPSHOT SURVEY OF INTERNATIONAL STUDENT ENROLLMENT

A Brief Report

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Fall 2014 Snapshot Survey of International Student Enrollment: A Brief Report

This report looks at the trends in international student enrollments on U.S. campuses for the current 2014 academic year based on a survey distributed to institutions around the U.S. by seven partnering higher education associations. It is released jointly with the Institute of International Education's *Open Doors* Report, which provides a more comprehensive view of international student enrollment in the U.S. based on data from the previous academic year (2013-14). In addition to providing a smaller "snapshot" of enrollment figures for the current fall semester, the fall survey also provides insights into the ongoing efforts of U.S. colleges and universities at international student recruitment and internationalization.

This report is based on early estimates from 280 institutions for fall 2014 and should not be viewed as comprehensive. It simply describes potential trends for the 2014-15 academic year, based on a limited sample. A more comprehensive view of 2014-15 enrollment figures will be released with *Open Doors*[1] 2015 in November 2015.

A snapshot of international student enrollment in 2014

For the 2014 fall semester, 75% (192) of institutions that responded to the survey reported an increase in international student enrollment compared with the previous academic year (2013-14)[2]. On average, the total number of international students grew by 7% and new international enrollments grew by 5.3%. The number of international students pursuing non-degree study almost doubled, while international undergraduate students and graduate students grew by 11.9% and 7.2%, respectively. Roughly 24% of institutions experienced a decrease in international student numbers this fall compared with the 2013-14 academic year.

Factors driving international student enrollments

Institutions reported on the main institutional, economic and other factors driving international student growth on their campuses, as reported in Table 1. Among institutional factors, a large majority of institutions reported that active recruitment efforts (78%) and a growing reputation and visibility of the institution (71%) were driving factors in growth. Increased linkages with universities in other countries (41.4%) and increases in institutional staff and resources dedicated to the recruitment and admission of international students (34.4%) were other important institutional factors. In terms of economic and other factors, the growth of foreign government-

[1] This fall survey collects data separately from the annual *Open Doors* Report on International Educational Exchange produced by the Institute of International Education in partnership with the U.S. Department of State. *Open Doors* provides comprehensive statistics and analysis based on detailed data collected throughout the previous year from more than 3,000 U.S. campuses; the international student figures reported in *Open Doors* 2014 are for academic year 2013/14.

[2] This number is out of 256 institutions that have comparable data from the previous academic year.

sponsored scholarship programs, such as those from Saudi Arabia and Brazil, was cited as an important factor (51.1%), as was the growth of the middle class in many source countries (50%).

Table 1: Factors driving increases in international student enrollments, 2014-15	**Percent reporting (N= 186)**
Institutional changes	
More active recruitment efforts by my institution	78.0%
Growing reputation and visibility of my institution abroad	71.0%
Increased number of linkages with international universities	41.4%
Increased institutional support staff and/or resources for recruitment and admission of international students	34.4%
Growth of institutional scholarship opportunities for international students	20.4%
New academic programming targeted to international students such as ESL programs	17.7%
Increased number of joint/dual degree programs	15.1%
Increased participation by international high school students in pre-college summer programs	7.5%
Lowered tuition and costs to the students	7.0%
Increased efforts as a result of the 100K Strong in the Americas initiative	6.5%
Economic and other factors	
Growth of foreign government-sponsored scholarship programs (e.g., Saudi Arabia, Brazil, etc.)	51.1%
Growth of the middle class in other countries	50.0%
Less concern by international students about visa availability	28.0%
Difficulty in getting into top schools in home country	26.8%
Weak dollar made U.S. tuition costs more attractive	10.8%
Fewer available jobs make graduate school a more attractive option	6.5%
Growth of scholarship opportunities from private sources	4.8%
Growth of scholarship opportunities from U.S. government (e.g., Fulbright) and/or state/local government sources	4.3%
More restrictive student visa policies in other countries make the U.S. more appealing	5.4%

However, as mentioned earlier, almost a quarter of responding institutions did experience declines in their international student enrollment (see Table 2). Among those that did, a majority reported that competition with other U.S. institutions (51.7%) and the cost of attending their own institutions (50%), including problems with securing adequate financial aid, were factors. Some institutions also cited the lack of sufficient staff and sources to recruit and admit international students (38.3%) and problems related to the visa application process (35%).

Table 2: Major reasons for decline in international students, 2014-15	Percent reporting (N=60)
Students' decisions to enroll in other *U.S.* institutions	51.7%
Cost of tuition/fees at U.S. host institution (including financial aid problems)	50.0%
Lack of sufficient institutional support staff and/or resources for recruitment and admission of international students	38.3%
Visa application process and concerns over delays/denials	35.0%
Students' decisions to enroll in *another country's* institutions (other than the US)	15.0%
Students' decisions to stay home and enroll in *their own country's* higher education institution	13.3%
Changes in admissions criteria and/or processes at U.S. host institution	10.0%
Home country political and/or economic problems	8.3%
Students' concerns about securing a job after their studies in the U.S.	6.7%
Problems/concern over fee payments related to SEVIS	1.7%
Concerns about potential problems at the port-of-entry	1.7%

Institutions were also asked whether or not they took specific steps to increase or maintain international student enrollment and what steps were taken. Over 75% of institutions reported taking active steps in increasing or maintaining enrollment. As Table 3 indicates, the most frequently cited step was increasing staff dedicated to the enrollment of international students (61.3%), while development of international programs and collaborations abroad (55.3%) was another important step for many institutions.

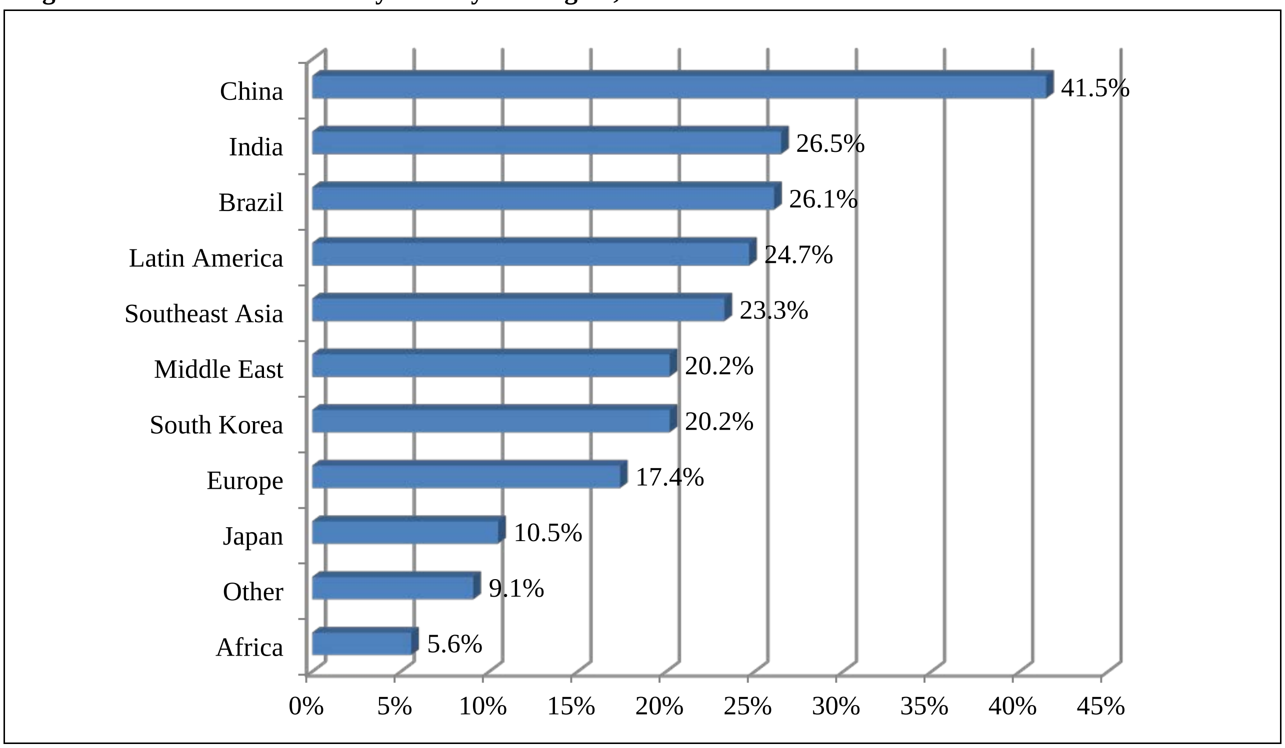
Table 3: Steps taken to increase enrollments	Percent reporting (N = 217)
New staff or additional staff time focused on international student enrollment	61.3%
New international programs or collaborations abroad	55.3%
New funding for international recruitment trips	35.0%
New social media campaigns	31.8%
Engaging third-party recruiters/agents	31.3%
Engaging alumni networks	27.6%
New funding for marketing and promotion of academic programs	24.4%
Other	15.7%

Among the 18.5% of institutions that reported taking no active steps to maintain or increase their international student enrollments, the greatest reason given was the lack of funding or resources needed to take such steps (50.9%), as shown in Table 4. Some institutions also noted that they chose to continue existing policies (32.1%) and that international student enrollment has been stable or growing without any specific intervention from the institution itself (30.2%).

Table 4: Reasons for NOT taking steps to increase enrollment	Percent reporting (N = 53)
Lack of funding or resources	50.9%
We have continued existing policies for international student recruitment	32.1%
International student enrollment is stable or growing	30.2%
Lack of institutional commitment to international education	26.4%
Other aspects of international education are considered higher priority on our campus	5.7%
Other	13.2%

For institutions actively recruiting in various countries around the world (see Figure 1), three of the top are major emerging economies: China (41.5%), India (26.5%), and Brazil (26.1%). Aside from East and South Asia, the world regions of Latin America (24.7%), Southeast Asia (23.3%), and the Middle East (20.2%) attract the attention of U.S. institutions seeking to recruit international students.

Figure 1: Recruitment efforts by country and region, Fall 2014



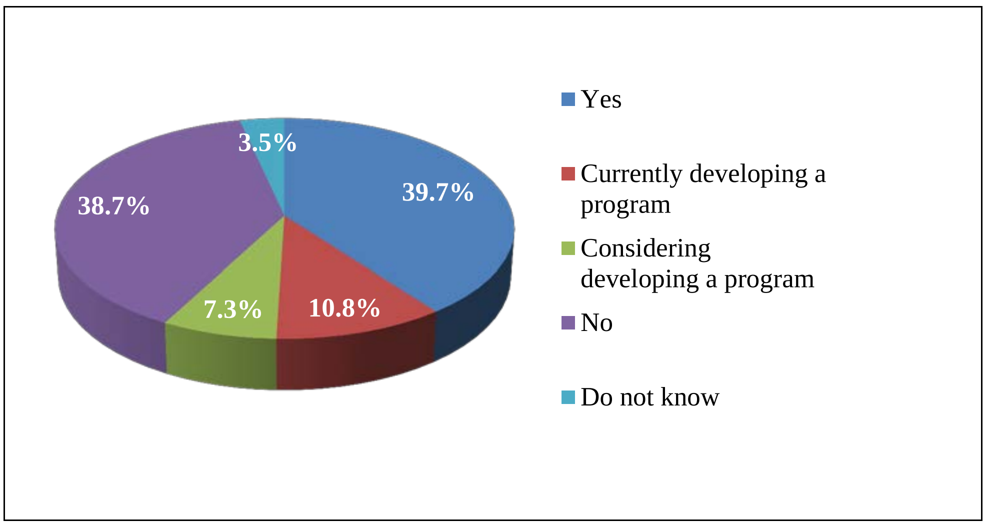
Pathway programs: a growing new trend

This year, we asked institutions about whether or not they have or are considering developing a pathway program on their campus. We define a pathway program as any program in which an international student:

- Has not met one or more admissions criteria at the institution, such as the English language requirement (e.g., a minimum TOEFL or IELTS score), or is otherwise deemed unready to begin regular coursework.
- Is conditionally or provisionally admitted to the institution upon completion of the pathway program.
- Learns and works on skills to become ready for regular coursework at the institution, such as English language skills and skills related to American academic culture, and may receive, in some instances, help in adjusting to living in the United States.

As show in Figure 2, over half of all institutions (57.8%) reported some engagement with a pathway program. Of these, almost 40% reported that they had a pathway program, 11% were developing a program, and a further 7% were considering establishing a program.

Figure 2: Status of pathway programs at institutions, percent responding, Fall 2014



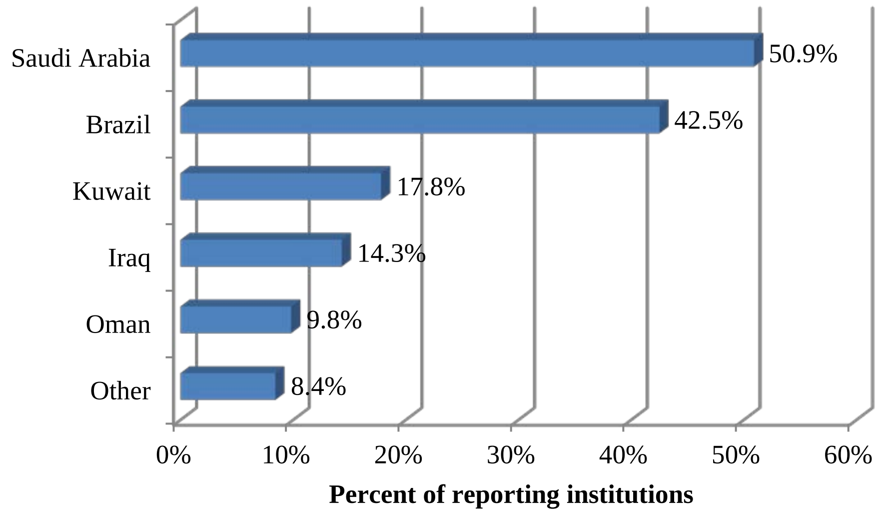
We also asked institutions that did have a pathway program or were developing one if they use a third-party provider (see Table 5). Among these institutions, only 15.8% said that they were using (or planning or considering using) a third-party provider, while a large majority (77.4%) said that they were not. For the 23 institutions utilizing a third-party provider, the vast majority reported that one reason for this was the provider's already established recruitment networks worldwide or in targeted regions (73.9%). Another major reason was that for many institutions, there was a lack of necessary resources, both human and physical, to provide such services alone (56.5%).

Table 5: Motivations for using a third-party provider	Percent reported (N = 23)
The provider has already developed strong recruitment networks worldwide or in targeted regions.	73.9%
The institution lacks the human and physical resources to develop such a program alone.	56.5%
The provider has a proven track record of recruitment and provision of services related to pathway programs.	39.1%
The provider has already developed best practices in recruiting international students and implementing pathway programs.	34.8%
The costs of implementing a pathway program can be shared with the third-party provider.	26.1%
Other	17.4%

The continued and growing role of government scholarships

As demonstrated in Figure 3, scholarships sponsored by foreign governments continue to play an important role for many international students and the institutions that host them. The surveyed institutions reported that the scholarship programs of Saudi Arabia (50.9%), such as the King Abdullah Scholarship Program (KASP) and scholarships from the Saudi Arabian Cultural Mission (SACM), continue to play a major role for the institutions. Brazil, particularly the Brazil Scientific Mobility Program (BSMP), continues to also be a major sponsor, with 42.5% of institutions reporting working with students sponsored by the Brazilian government. Other countries in the Middle East have also developed scholarship programs, with Kuwait (17.8%), Iraq (14.3%), and Oman (9.8%) being prominent among surveyed institutions. Turkey, Qatar, the United Arab Emirates (UAE), and Malaysia were also frequently mentioned.

Figure 3: Percent of institutions participating in foreign government scholarship programs



The 100,000 Strong in the Americas initiative

Respondents were asked again this year about their involvement with the 100,000 Strong in the Americas initiative, a U.S. federal government program designed to boost student mobility throughout the Western Hemisphere[3]. Close to 40% of responding institutions reported engagement with countries in the Western Hemisphere over the past year.

Among activities undertaken by an institution related to the 100,000 Strong in the Americas initiative (Table 6), planning and recruitment trips through the Western Hemisphere (23.3%) and partnerships with institutions in the region (22.6%) were the most reported.

Table 6: Institutional activities related to the 100K Strong in the Americas initiative	Percent reported
Conducted planning and recruitment trips to countries in the region	23.3%
Engaged in partnership activities with institutions in the region (research, faculty exchange, etc.)	22.6%
Hosted more students from the region	16.7%
Opened departments or centers dedicated to study of and/or engagement in the region	1.0%
Other	4.9%

Helping students from countries in turmoil

Institutions were also asked about any help that they have been able to offer students from countries affected by political turmoil, such as Syria and Ukraine. Some institutions have been

[3] For more on this program, visit the program website at www.100kstrongamericas.org.

able to reduce or waive tuition and other fees for such students, with some state institutions being able to provide students with in-state tuition. Scholarships, grants, and deferred payment plans were another commonly cited form of assistance in dealing with the costs of attending. Some of these scholarships have come through funding from IIE and involvement in IIE's Syria Consortium on Higher Education in Crisis[4]. A few institutions mentioned helping students in such areas as housing, food (meal plans), and finding employment. Still others mentioned supporting students mentally and emotionally, such as through campus counseling services. Others simply stated that they worked with students on a case-by-case basis.

Conclusion

International student enrollments in U.S. higher education institutions continue to grow. U.S. higher education continues to benefit from international prestige and the growing reputation of many of its institutions, as well as from the continued growth of the middle class in many developing countries. Competition from other U.S. institutions and the often high costs of attendance are barriers for some institutions in attracting international students. However, many institutions continue to recruit strongly, often increasing funding, staff, and resources. The continued growth of foreign government scholarships, new institutional initiatives such as pathway programs, and the 100,000 Strong in the Americas Initiative may help bolster international student numbers at U.S. institutions for the foreseeable future.

[4] For more on IIE's Emergency Assistance for Students, visit http://www.iie.org/en/What-We-Do/Emergency-Assistance. For information specifically on the Syria Consortium for Higher Education in Crisis and assistance for Syrian students, visit http://www.iie.org/Programs/Syria-Scholarships.

APPENDIX:

About the survey

A total of 280 institutions responded to the survey, reflecting a wide range of U.S. higher education. Among the respondents, 27.9% enroll 20,000 or more students, 22.9% enroll 10,000 to 19,999 students, 17.1% enroll 5,000-9,999 students, 28.2% enroll 1,000-4,999 students, and 1.8% enroll less than 1,000 students. The composition of the respondent pool was as follows: Doctoral/Research institutions (36%), Master's institutions (34%), Baccalaureate colleges (15%), two-year colleges (4%), and Professional/Specialized institutions (11%). The survey was carried out by the Institute of International Education (IIE) in cooperation with the American Association of Community Colleges (AACC), American Association of State Colleges and Universities (AASCU), American Council on Education (ACE), Association of Public and Land-grant Universities (APLU), Council of Graduate Schools (CGS), and NAFSA: Association of International Educators.

Number of students reported and percent change by country and region, fall 2014

Based on the reported numbers, there appears to be a potential decrease in students from East and Southeast Asia but balanced with growth from other countries. According to data from responding institutions, Brazil, India, and select countries in the Middle East saw growth in the numbers of students coming to the U.S. While these findings might be indicative of a wider trend, they should be interpreted with caution given the very small respondent pool of 280 institutions and missing responses from some institutions that host large numbers of international students.

Country/Region	2014	2013	Percent change
China	108445	111855	-3.1%
India	43804	43051	1.7%
South Korea	20066	22691	-11.6%
Saudi Arabia	15626	16536	-5.5%
Japan	5827	6436	-9.5%
Vietnam	4291	4467	-3.9%
Brazil	7381	4082	80.8%
Indonesia	2373	2445	-2.9%
Nigeria	142	136	4.4%
Kuwait	79	91	-13.2%
Iraq	670	562	19.2%
Oman	93	83	12.0%
Europe	26710	30053	11.1%